



State Energy Program

**Proposed Interim Performance Approach
for ARRA Residential Retrofit Contracts**

for Operation in Parallel to HERS II Ramp-up

Staff Workshop

California Energy Commission

June 29, 2010

Need for Interim Performance Approach

- ARRA SEP Comprehensive Residential Retrofit and Municipal Financing Contracts are **nearing launch**
- Need an interim performance approach to calculate compliance with municipal financing contracts loading order requirement (10% energy efficiency before onsite PVs) at contract launch – interim performance approach **does not produce ratings**
- Need a **ramp up period for HERS II** Providers after approved to get HERS II raters trained and in place around the state and work through any start-up issues so that HERS II will be **accepted as a successful program**
- Interim Performance Approach needed **in parallel** with HERS II ramp up (to July 1, 2011)
- ARRA **Contracts can switch over solely to HERS II** as soon as they are satisfied with HERS II in their area

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Interim Performance Approach Requirements

- **Installing Contractor firm must have a BPI Certified Building Analyst**
- **Contractor must use Commission approved software**
 - **Passes BESTest**
 - **Reports Total Building TDV Energy for determining 10% savings**
 - **Electronically Reports measures to HERS Provider**
 - **Uses measures consistent with HERS II**
- **HERS I Rater verifies on a sample of homes that measures were installed correctly**
- **No HERS Ratings, rating certificates, or rating reports**

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Comparison of HERS II /Interim Performance

Interim Performance Approach	HERS II Whole-House Rating
Contractor uses HERS II or other Commission approved software to determine % energy savings	Certified HERS II rater uses HERS II approved software to complete energy audit/rating, evaluate cost effectiveness and % savings
Homeowner receives contractor recommendations for measures	Homeowner receives HERS II rating certificate, rating report with recommended improvements and estimated savings
Homeowner decides on retrofits	Homeowner decides on retrofits
Contractor performs work	Contractor performs work
Contractor electronically submits software output file to HERS Provider database for verification	Rater submits project data into Provider database for verification, QA tracking and reports
HERS I field verifier verifies measures	HERS II Rater does post-retrofit rating with report to SEP program administrator

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HERS II Ramp Up

- **July 28, 2010 – First of HERS II Providers approved**
- **More than 700 HERS I Field Verification Raters are ready to augment their HERS core training to become HERS II certified**
- **Community College entry level HERS training is happening throughout the state at no cost or low cost to trainee**
- **HERS Providers anticipate approximately 300 HERS II Raters to be certified before end of summer and approximately 500 by January, 2011**
- **Energy Commission will provide updated information as HERS ramp up progresses**

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